



USDA Weekly Retail Turkey Feature Activity

Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 08/01 thru 08/07.

Fri. Aug 01, 2014

(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

NATIONAL SUMMARY						
	THIS WEEK		LAST WEEK		LAST YEAR	
Feature Rate ^{1/}	49.6% of 22,900 outlets		30.3% of 22,900 outlets		50.7% of 23,200 outlets	
Special Rate ^{4/}	1.2%		0.5%		1.8%	
Activity Index ^{2/}	17,200		11,870		18,970	
3/	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg
WHOLE BIRDS:						
Fresh - Hens						
" - Toms						
Frozen - Hens	10	1.19	10	0.99	110	0.99
" - Toms	10	1.19				
PARTS:						
Breast:						
Bone-in, whole						
Fresh						
Frozen	2,550	1.55	460	1.31	910	1.66
Split, bone-in						
Fresh						
Rotisserie	110	8.63	290	6.99	320	8.63
Boneless, whole	50	4.49	360	4.89	10	3.99
Cutlets	160	4.88	560	5.29	430	5.04
Cutlets, thin sliced	220	4.99	180	4.99		
Strips						
Tenders	90	4.80	330	5.17	290	4.82
Marinated Tenders	320	4.34	780	4.54	850	4.53
Drumsticks						
Thighs			80	1.89	280	1.87
Wings	90	1.97			150	1.96
Necks	10	1.79	40	1.68	290	2.09
Smoked Drumsticks	10	1.79	10	1.79	50	1.79
Smoked Wings	140	2.85	20	1.99	40	2.09
Smoked Necks	140	2.85	20	1.99	30	1.96
	20	1.99			30	1.96
GROUND TURKEY:						
Patties	10,180	3.26	6,080	3.55	13,580	3.13
Sausage	1,260	3.35	890	4.53	1,580	3.61
85% lean	850	3.40	980	3.61	1,440	3.35
93% lean	1,890	2.56	1,400	2.96	5,160	2.53
Breast	5,450	3.34	2,670	3.49	4,210	3.25
Rolls (frsh/frz 1 lb.)	730	4.54	140	4.70	1,190	4.59
	610	2.57	740	2.66	890	2.66
Specialty ^{5/}						
Patties	630	4.80	50	4.19	280	4.94
93-94% lean	1,560	4.90	610	3.62	340	3.88
Breast	50	6.31	1,250	6.48	90	5.39

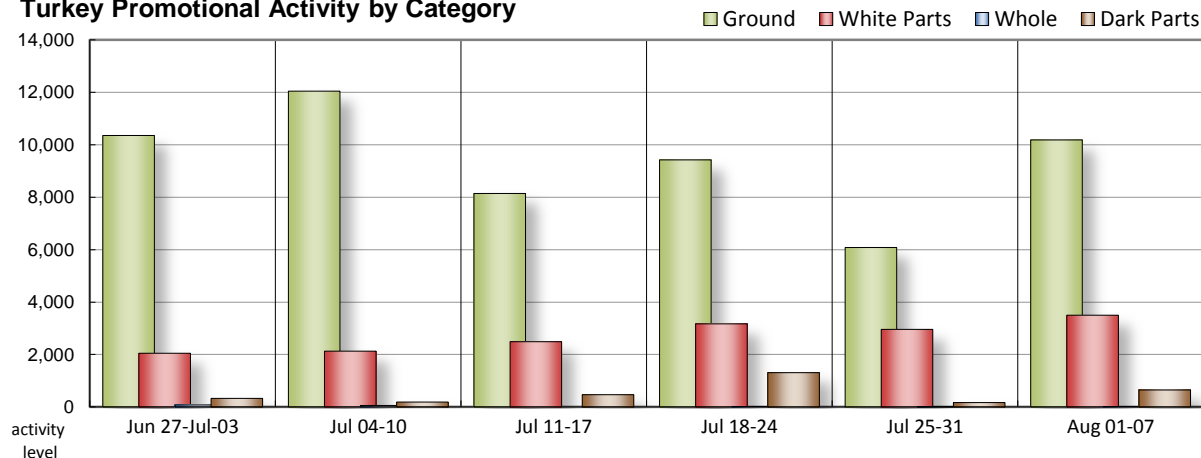
Note: rolls & specialty not included in ground turkey total and weighted average.

Source: USDA Agricultural Marketing Service, Livestock, Poultry & Grain Market News (515) 284-4471

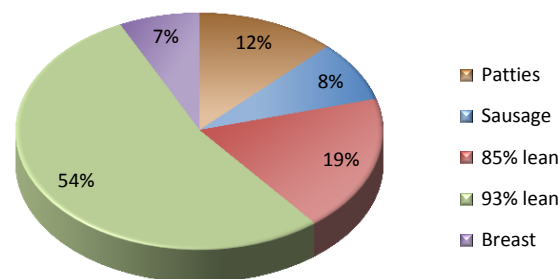
This Week's Turkey Feature Highlights

Retail feature activity increases for the first of the month. Retailers continue to show little interest in featuring whole turkeys; however frozen bone-in breasts are heavily promoted, especially in the Southeast and Midwest regions. Offerings decline on rotisserie breasts; prices are higher. Featuring slows on boneless white parts; advertised prices are unchanged to lower. Marinated tenders are the most actively featured and the lowest priced item in this category. More stores are showing dark parts in this week's circulars. It won't be difficult to find promotions for ground turkey; feature activity is sharply higher and prices are lower on all grinds. The 93% lean accounts for over half of this week's feature activity on grinds. Deli promotional activity increases on service and self-service deli items. Most of the increase for service deli promotions is on thick slicing meats, especially processor brands. Feature activity is also sharply higher on processor brand self-service deli items; prices are similar to last week's levels.

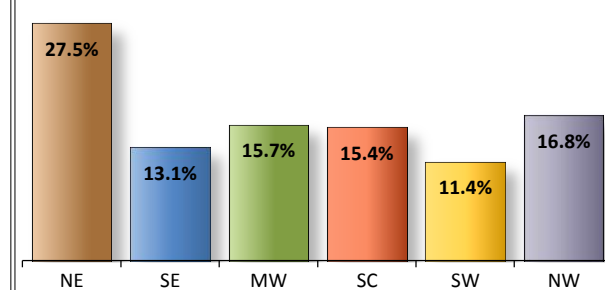
Turkey Promotional Activity by Category



Ground Turkey Featuring by Type



Relative Feature Activity by Region



All report information gathered from publicly available sources including store circulars, newspaper ads, and retailer websites.

1/ Feature Rate: the amount of sampled stores advertising any reported turkey item during the current week, expressed as a percentage of the total sample. **2/ Activity Index:** a measure of the absolute frequency of feature activity equal to the total number of stores for each advertised turkey item (e.g., a retailer with 100 outlets featuring 3 turkey items has an activity index of 300). **3/ Stores/Avg:** the total number of advertising outlets and the weighted average price weighted by the respective number of outlets. **4/ Special Rate:** the percentage of sampled stores with a no-price promotion (e.g., buy 1, get 1 free, etc.). **5/ Specialty:** products produced from birds raised on an all vegetable diet without antibiotics and minimally processed.



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(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

Fri. Aug 01, 2014

	NORTHEAST U.S. (CT,DE,MA,MD,ME,NH,NJ,NY,PA,RI,VT)			SOUTHEAST U.S. (AL,FL,GA,MS,NC,SC,TN,VA,WV)			MIDWEST U.S. (IA,IL,IN,KY,MI,MN,ND,NE,OH,SD,WI)		
Special Rate ^{4/}	68.7% of 4,700 sampled outlets			56.5% of 5,900 sampled outlets			55.3% of 4,200 sampled outlets		
Activity Index ^{2/}	1.3% of stores w/ no-price promotions			0.0% of stores w/ no-price promotions			4.9% of stores w/ no-price promotions		
	Activity Index = 5,510			Activity Index = 3,580			Activity Index = 2,870		
	Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg	
WHOLE BIRDS:									
Fresh - Hens									
" - Toms									
Frozen - Hens				1.19	10 1.19				
" - Toms				1.19	10 1.19				
PARTS:									
Breast:									
Bone-in, whole									
Fresh									
Frozen	1.39 - 1.69	330 1.47		1.49 - 1.69	880 1.54		1.19 - 1.99	1,030 1.56	
Split, bone-in									
Fresh									
Rotisserie	8.99	10 8.99							
Boneless, whole									
Cutlets	4.99	110 4.99					4.69	20 4.69	
Cutlets, thin sliced	4.99	220 4.99							
Strips									
Tenders							4.69	20 4.69	
Marinated Tenders	4.53	160 4.53		3.73 - 4.53	120 3.98		3.73 - 5.33	30 4.69	
Drumsticks	1.69	140 1.69					1.79 - 1.99	110 1.97	
Thighs									
Wings							1.79 - 1.99	90 1.97	
Necks							1.79	10 1.79	
Smoked Drumsticks	2.99	120 2.99		1.99	20 1.99				
Smoked Wings	2.99	120 2.99		1.99	20 1.99				
Smoked Necks				1.99	20 1.99				
GROUND TURKEY:									
Patties	3.00 - 3.99	910 3.32		3.00 - 3.29	70 3.04		3.49 - 3.99	140 3.54	
Sausage	2.79 - 3.97	320 3.51					2.86 - 3.28	230 3.18	
85% lean	2.33 - 3.67	230 2.90		2.29 - 2.33	1,020 2.33		2.29 - 2.99	230 2.57	
93% lean	2.39 - 4.99	2,290 3.44		2.91 - 4.79	1,250 3.31		2.66 - 3.99	610 3.24	
Breast (99-100% lean)	4.49 - 5.38	50 4.62		3.99	10 3.99		3.99 - 4.99	210 4.24	
Rolls (frsh/frz 1 lb.)				2.99	70 2.99		2.69 - 3.49	120 3.41	
Specialty ^{5/}									
Patties	3.99 - 5.00	220 4.39		5.00	40 5.00		5.00	10 5.00	
93-94% lean	3.49 - 5.00	230 4.35		5.00	40 5.00		5.00	10 5.00	
Breast	5.00 - 6.99	50 6.31							



USDA Weekly Retail Turkey Feature Activity

Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 08/01 thru 08/07.

(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

Fri. Aug 01, 2014

	SOUTH CENTRAL U.S. (AR,AZ,CO,KS,LA,MO,NM,OK,TX,UT)			SOUTHWEST U.S. (CA,HI,NV)			NORTHWEST U.S. (AK,ID,MT,OR,WA,WY)		
Feature Rate ^{1/}	30.4% of 4,200 sampled outlets			27.6% of 2,800 sampled outlets			37.3% of 1,200 sampled outlets		
Special Rate ^{4/}	0.0% of stores w/ no-price promotions			0.0% of stores w/ no-price promotions			0.0% of stores w/ no-price promotions		
Activity Index ^{2/}	Activity Index = 2,810			Activity Index = 1,510			Activity Index = 920		
	Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg	
WHOLE BIRDS:									
Fresh - Hens									
" - Toms									
Frozen - Hens									
" - Toms									
PARTS:									
Breast:									
Bone-in, whole									
Fresh									
Frozen	1.49 - 1.79	200	1.51	1.49	20	1.49	1.68 - 1.88	90	1.86
Split, bone-in									
Fresh									
Rotisserie	7.99	40	7.99	8.99	60	8.99			
Boneless, whole	4.49	30	4.49				4.49	20	4.49
Cutlets	3.99 - 4.88	30	4.60						
Cutlets, thin sliced									
Strips									
Tenders	3.99 - 4.99	70	4.84						
Marinated Tenders							4.59	10	4.59
Drumsticks									
Thighs									
Wings									
Necks									
Smoked Drumsticks									
Smoked Wings									
Smoked Necks									
GROUND TURKEY:									
Patties	3.49	80	3.49	3.49	40	3.49	3.49	20	3.49
Sausage	3.19 - 3.99	190	3.42	3.39 - 3.52	50	3.50	3.52 - 3.60	60	3.58
85% lean	2.74 - 2.99	340	2.92	2.79 - 3.19	50	2.89	2.79	20	2.79
93% lean	2.99 - 3.43	630	3.45	2.31 - 4.23	530	2.89	3.19 - 3.99	140	3.42
Breast (99-100% lean)	4.39 - 5.00	270	4.89	5.99	30	5.99	3.99 - 4.79	160	4.10
Rolls (frsh/frz 1 lb.)	1.89 - 2.99	250	2.11	2.49	170	2.49			
Specialty ^{5/}									
Patties	5.00	340	5.00	5.99	10	5.99	5.00	10	5.00
93-94% lean	5.00	340	5.00	5.00	550	5.00	4.99 - 5.00	390	5.00
Breast									



USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 08/01 thru 08/07.

(prices in dollars per pound unless otherwise noted; does not reflect all poultry items available in the marketplace)

Fri. Aug 01, 2014

	NATIONAL SUMMARY						NORTHEAST U.S.			SOUTHEAST U.S.		
	This Week		Last Week		Last Year		(CT,DE,MA,MD,ME,NH,NJ,NY,PA,RI,VT)			(AL,FL,GA,MS,NC,SC,TN,VA,WV)		
Feature Rate ^{1/}	71.2% of 22,900 stores		61.6% of 22,900 stores		80.3% of 23,200 stores		80.5% of 4,700 sampled outlets			74.8% of 5,900 sampled outlets		
Activity Index 2/	54,260		37,910		50,280		Activity Index = 14,750			Activity Index = 15,480		
	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg	Price Range (\$/pound)	Summary Stores	Summary Wtd Avg	Price Range (\$/pound)	Summary Stores	Summary Wtd Avg
SERVICE DELI - Turkey												
Category 1												
Processor Brand	9,200	7.96	4,770	8.40	4,760	8.14	5.99 - 10.99	2,600	8.10	6.49 - 9.99	4,160	8.14
Private Brand	3,130	7.38	2,440	7.57	1,380	7.87	6.99 - 9.99	2,430	7.09			
Category 2												
Processor Brand	1,940	5.65	3,820	5.96	4,290	6.08	4.59 - 6.99	430	5.20	4.99 - 5.99	100	5.57
Private Brand	2,310	7.09	2,540	6.79	5,460	7.20	5.99 - 7.99	530	6.77	7.99	40	7.99
Category 3												
Processor Brand	1,020	4.01	1,140	3.99	740	4.07	3.69 - 4.99	740	4.03	3.99 - 4.88	60	4.21
Private Brand	150	4.98	20	4.11	320	4.85	4.98	150	4.98			
Turkey Ham												
Processor Brand	500	3.73	420	4.19	460	3.84	3.29 - 4.99	290	3.73	4.69	30	4.69
Private Brand												
Turkey Pastrami												
Processor Brand	30	4.82	510	4.23	350	4.48				7.99	10	7.99
Private Brand												
SERVICE DELI - Chicken												
Category 1												
Processor Brand	3,340	7.87	3,210	7.46	3,740	7.63	6.48 - 8.99	930	8.28	5.99 - 8.49	810	7.90
Private Brand	2,250	7.51	900	7.37	2,380	7.30	6.99 - 7.99	1,770	7.49			
Category 2												
Processor Brand	240	5.23	180	5.33	80	4.99	4.99	140	4.99			
Private Brand	350	6.03	20	4.99	220	7.53						
SELF-SERVICE DELI												
(dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	11,740	3.23	6,540	3.21	10,980	3.15	2.29 - 4.49	2,150	3.32	2.35 - 4.00	3,880	3.18
Private Brand	1,930	3.22	680	3.11	770	3.06	2.48 - 3.29	210	3.11	2.99 - 3.33	1,090	3.33
Turkey 16 oz												
Processor Brand	2,600	5.51	4,040	4.52	2,850	4.53	4.99 - 5.99	100	5.85	3.99 - 5.99	450	4.83
Private Brand			20	5.00	210	4.99						
Chicken 7-10 oz												
Processor Brand	11,630	3.24	6,050	3.24	10,600	3.17	2.50 - 4.49	2,080	3.35	2.50 - 4.00	3,760	3.20
Private Brand	1,900	3.22	610	3.12	690	3.06	2.48 - 3.29	200	3.12	2.99 - 3.33	1,090	3.33

Category 1: composed of 1-3 whole breast lobes using no binders. (slicing)

Category 2: composed of multiple (5-7) whole or partial breast muscles; sectioned and formed with minimal binders. (thin slicing)

Category 3: composed of multiple muscle pieces chopped and reformed into desired shape. (shaving)



USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats

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	MIDWEST U.S. (IA,IL,IN,KY,MI,MN,ND,NE,OH,SD,WI)			SOUTH CENTRAL U.S. (AR,AZ,CO,KS,LA,MO,NM,OK,TX,UT)			SOUTHWEST U.S. (CA,HI,NV)			NORTHWEST U.S. (AK,ID,MT,OR,WA,WY)		
Feature Rate ^{1/}	69.5% of 4,200 sampled outlets			64.2% of 4,200 sampled outlets			63.0% of 2,800 sampled outlets			66.0% of 1,200 sampled outlets		
Activity Index ^{2/}	Activity Index = 7,670			Activity Index = 8,110			Activity Index = 5,780			Activity Index = 2,470		
	Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg	
SERVICE DELI - Turkey												
Category 1												
Processor Brand	6.99 - 9.99	860 7.40		6.75 - 10.49	670 7.98		6.99 - 8.99	680 7.02		6.99 - 12.99	230 8.00	
Private Brand	6.98 - 8.99	170 8.41		7.99 - 8.49	400 8.05		9.49	130 9.49				
Category 2												
Processor Brand	4.99 - 6.99	590 5.89		4.99 - 5.49	760 5.70		5.49	10 5.49		5.99	50 5.99	
Private Brand	4.99 - 6.99	480 6.11		5.99 - 7.99	380 7.46		7.99	550 7.99		6.99	330 6.99	
Category 3												
Processor Brand	2.99 - 3.99	130 3.87		3.99	80 3.99					3.99	10 3.99	
Private Brand												
Turkey Ham												
Processor Brand	2.99 - 3.49	40 3.38		3.39	20 3.39		2.89 - 3.99	120 3.65				
Private Brand												
Turkey Pastrami												
Processor Brand	3.49	10 3.49					2.99	10 2.99				
Private Brand												
SERVICE DELI - Chicken												
Category 1												
Processor Brand	5.99 - 9.49	340 7.08		5.99 - 9.49	370 7.13		6.99 - 8.99	610 8.08		5.99 - 11.99	280 7.89	
Private Brand	10.99	10 10.99		5.99 - 7.99	470 7.51							
Category 2												
Processor Brand	3.69 - 5.99	100 5.56										
Private Brand	5.99 - 6.98	310 6.04		5.99	40 5.99							
SELF-SERVICE DELI												
(dollars per tub or pouch)												
Turkey 7-10 oz												
Processor Brand	1.98 - 3.79	1,680 3.00		2.49 - 2.99	2,280 3.20		2.50 - 3.99	1,180 3.50		1.89 - 3.99	570 3.53	
Private Brand	2.49 - 3.29	250 2.99					2.99 - 3.29	380 3.12				
Turkey 16 oz												
Processor Brand	3.99 - 5.99	670 5.06		4.99 - 5.99	400 5.87		5.99	550 5.99		5.49 - 5.99	430 5.87	
Private Brand												
Chicken 7-10 oz												
Processor Brand	1.98 - 3.79	1,800 2.94		2.49 - 2.99	2,240 3.21		2.50 - 3.99	1,180 3.50		1.89 - 3.99	570 3.53	
Private Brand	2.69 - 3.29	230 3.01					2.99 - 3.29	380 3.12				

Category 1: composed of 1-3 whole breast lobes using no binders. (slicing)

Category 2: composed of multiple (5-7) whole or partial breast muscles; sectioned and formed with minimal binders. (thin slicing)

Category 3: composed of multiple muscle pieces chopped and reformed into desired shape. (shaving)